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FinancialPlanning

Wealthtech Weekly

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Reporter

As we do each year, my Financial Planning colleagues and I put our heads together to figure out who will be the most influential in the wealth management industry in the coming year. While there may be some familiar faces to you here, others may be less so. From tech leaders to innovative CEOs to dedicated educators, here's the 20, well, technically 21, people who we think will shape wealth management in 2026.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Happy Holidays! Talk to you next Thursday!

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TOP STORIES

20 IN 2026

20 people who will shape wealth management in 2026

Charles Schwab CEO Rick Wurster, IRS CEO and Social Security Administration Commissioner Frank Bisignano and iCapital's Chief Investment Strategist Sonali Basak made the list — see who else did.

- **10 experts predict what's next for investing in 2026**
  From crypto to private markets to AI and beyond, here are the investing trends and themes to watch in the new year.
- **Could rescheduling make marijuana investments viable?**
  President Donald Trump is reportedly considering moving cannabis from a Schedule I to Schedule III substance. Experts say this could go a long way toward establishing the industry's legitimacy.
- **10 lessons from AI's transformative year in wealth management**
  Yes, AI is saving many advisors time and helping them reach prospects. But some say the rapid rate of adoption and automation could put them out of a job in the future.
- **An advisor's year-end playbook: Client deadlines, firm strategy and finishing strong**
  As deadlines loom, firms juggle tax-driven client work with retreats, reflection and recalibrating the business for 2026.

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